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Avian Influenza and the OIE Terrestrial Animal Health Code

A highly pathogenic form of avian influenza first appeared in Italy around 1878. Sporadic outbreaks have since occurred around the world. In 2003 an outbreak of HPAI in the Netherlands spread to parts of Belgium and Germany and resulted in the loss of more than 28 million poultry, in 2004 Canada lost over 16 million birds in to an outbreak of HPAI, and as of January 2004, FAO estimated that around 20-25 million birds had been culled in Asia.

To date, all highly pathogenic isolates have been influenza A viruses of subtypes H5 and H7.

At the 73rd General Session of the World Organization for Animal Health held in May 2005, the delegates adopted changes in the obligations of OIE Member Countries to notify avian influenza ("notifiable avian influenza").

The new definition of notifiable AI (NAI) is defined as an infection of poultry caused by any influenza A virus of the H5 or H7 subtypes or by any AI virus with an intravenous pathogenicity index (IVPI) greater than 1.2 (or as an alternative at least 75% mortality) as described in Chapter 2.7.12 of the OIE Terrestrial Animal Health Code. NAI viruses can be divided into low-pathogenic notifiable AI (LPNAI) or highly pathogenic notifiable AI (HPAI). The change will come into effect on January 1, 2006.

Another change is the regionalization with specific requirements to declare an area free of NAI. A country, zone or compartment may be considered free from NAI. A compartment means one or more establishments under a common biosecurity management system containing an animal subpopulation with a distinct health status with respect to a specific disease or specific diseases for which required surveillance, control and biosecurity measures have been applied for the purpose of international trade. A zone/region means a clearly defined part of a country containing an animal subpopulation with a distinct health status with respect to a specific disease for which required surveillance, control and biosecurity measures have been applied for the purpose of international trade.

Source: UK Department for Environment Food and Rural Affairs, United Nations Food and Agriculture Organization, OIE Terrestrial Animal Health Code, USDA/AMS

Indonesia

Over nine million chickens have died in Indonesia since the first outbreak in 2003. The disease has been found in 21 out of 30 provinces. Officials used surveillance programs, vaccinated healthy chickens and only culled sick chickens. Pigs have also tested positive for H5N1.

After the country's first human death from H5N1 was confirmed in July 2005, officials announced a decision to cull all chickens and pigs in the affected areas.

The Agriculture Minister said the culling operation would cost up to 800 billion rupees (US 84.2 million), but the department only has 104 billion available and will only cull infected poultry and pigs.

Source: News wires

EU Poultry Situation

Broiler production is forecast to increase in 2005, and slightly in 2006, but at a lower pace than domestic consumption, resulting in an expected increase in imports. Exports are expected to decrease marginally in 2005 and stabilize in 2006.

Chicken Production (Top 5 member states) 1000MT

	2004	2005	2006
United Kingdom	1,251	1,270	1,280
Spain	1,053	1,051	1,050
Benelux	1,042	1,060	1,060
960	920	895	
Italy	662	635	640

Chicken Exports (Top 5 member states) 1000MT

	2004	2005	2006
France	263	245	240
Benelux	226	245	255
Germany	87	90	90
Denmark	53	55	55
United Kingdom	56	55	50

Turkey production is forecast to increase in 2005 and 2006. The only turkey slaughter plant in Denmark closed operations in April 2004. Turkey imports from Brazil accounted for 85 percent of EU imports in 2004. Imports are expected to increase in 2005 and 2006. Exports are expected to increase slightly in 2005 and 2006.

Turkey Production (Top 5 member states) 1000MT

	2004	2005	2006
France	624	590	575
Germany	397	410	420
Italy	279	305	305
United Kingdom	227	220	215
Poland	190	200	205

Turkey Exports (Top 5 member states) 1000MT

	2004	2005	2006
France	103	95	90
Germany	36	60	65
Benelux	16	16	16
Italy	10	10	10
United Kingdom	9	10	10

Poultry production has mostly recovered from the 2003 Avian Influenza outbreak in the Benelux (Belgium, Netherlands, Luxembourg) or the 2003 nitrofurans scare in Portugal, producers and processors in both the EU-15 and the NMS are still adapting to the new market situation that arose as a result of the 2004 Enlargement process.

Increasing competition in world markets and decreases in EU export refund levels are driving poultry and turkey production down in France and Spain in 2005. In the Benelux, UK and Germany production is increasing, in part due to increased domestic consumption.

Source: USDA/FAS

Inspected Egg Products-U.S. & Canada Export/Import Trade**U.S./Canadian Live Poultry Slaughtered Under Inspection**

W/E 16-Jul-05 (PRELIMINARY)

U.S. Exports to Canada, in Pounds (000) (Preliminary)

Week Ending July 16, 2005		Year-To-Date		
TYPE	2005	2004 1/	2005 2/	2004
Liquid	285	456	7,190	7,340
Frozen	0	0	21	11
Dried	36	40	243	427
Total	321	496	7,454	7,778

U.S. Imports From Canada, in Pounds (000) (Preliminary)

Week Ending July 16, 2005		Year-To-Date		
TYPE	2005	2004 1/	2005 2/	2004
Liquid	154	328	2,934	4,058
Frozen	3	0	424	1,048
Dried	0	0	346	1,647
Total	157	328	3,704	6,753

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending July 16, 2005		Year-To-Date		
TYPE	2005	2004 1/	2005 2/	2004
Jumbo	0	0	100	254
Extra Large	0	10,940	48,660	82,226
Large	0	20,640	84,164	191,991
Medium	0	5,838	45,005	61,842
Ungraded	0	3,096	60,434	170,250
Misc	0	780	5,053	15,230
Total	0	41,294	243,416	521,793

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week(s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.

U.S. Fowl Slaughtered Domestically

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,431	1,543	2,974
Last Week	1,268	1,196	2,464
Same week yr ago	1,614	1,420	3,034
To-date/2005	43,137	38,712	81,849
To-date/2004	37,672	36,415	74,087

U.S. Fowl Slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	191	0	191
Last Week	238	0	238
Same week yr ago	301	8	309
To-date/2005	7,598	33	7,631
To-date/2004	6,811	90	6,901

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Total U.S. Fowl slaughtered in the U.S. and Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,622	1,543	3,165
Last Week	1,506	1,196	2,702
Same week yr ago	1,915	1,428	3,343
To-date/2005	50,735	38,745	89,480
To-date/2004	44,483	36,505	80,988

Source: USDA/AMS Poultry Programs, Market News Branch

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Jul 22, 2005

CHICKEN WITH SKIN ADDED

		--- PRICES ---		---- VOLUME ----	
FAT CONTENT		FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS					
RANGE		24.00	24.00	122,400	-
WTD AVERAGE		24.00	24.00		
15-20%					
RANGE	18.00-24.00	15.00-26.00	2,386,800	1,020,000	
WTD AVERAGE	19.55	19.53			
20% OR MORE					
RANGE	-	-	-	-	-
WTD AVERAGE					

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Jul 22, 2005

CHICKEN WITH SKIN ADDED

		--- PRICES ---		---- VOLUME ----	
FAT CONTENT		FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS					
RANGE		20.50	22.50-26.00	570,000	208,000
WTD AVERAGE		20.50	23.73		
15-20%					
RANGE	16.00-27.00	17.00-24.00	2,032,000	1,352,000	
WTD AVERAGE	19.68	19.65			
20% OR MORE					
RANGE	-	14.00-19.00	160,000	-	-
WTD AVERAGE	15.25				

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 22 JULY 2005.

The market tone on frozen tom drums was about steady, tom wings steady to fully steady, tom v-type wings and tom necks mostly steady. Supplies of tom drums were adequate to fully adequate, necks, tom wings and tom v-type wings were adequate to instances tight. Demand was slow to moderate on bulk parts. Institutional size breasts: grade A basted 8-10 lb 115, 12-14 lb 145; plant grade basted 20-24 lb 142. Fresh wing meat moved at 76 cents delivered. Export trading was fair. For export: fresh thigh meat 84-86, machine defatted and hand defatted gizzards 41 FOB, frozen breeder thigh meat February and newer production 77 FOB, and fresh tom drums at open prices for August shipments.

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME	WEEKLY	WEEKLY
FRIDAY, JULY 22, 2005	RANGE	CODE 1/	PRICE	(000)	PRICE	(000)
DRUMSTICKS, TOMS	50.00		50.00	120	49.99	242
WINGS FULL-CUT - TOMS		M	31.12	185	31.12	185
WINGS, V-TYPE, TOM		R	30.50	624	29.95	1,144
TAILS		R	25.00	80	25.17	120
MECHANICALLY SEPARATED 2/		W	26.00	160	26.00	160
THIGH MEAT - FROZEN		R	84.65	308	85.03	732

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
THURSDAY, JULY 21, 2005	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS	50.50		50.50	80
WINGS FULL-CUT - TOMS		M	31.12	185
WINGS, V-TYPE, TOM	30.00-31.00		30.50	624
TAILS	25.00		25.00	80
MECHANICALLY SEPARATED 2/		W	26.00	160
THIGH MEAT - FROZEN	84.00-86.00		84.65	308

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
WEDNESDAY, JULY 20, 2005	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS	49.00		49.00	42
WINGS FULL-CUT - TOMS		M	31.12	185
WINGS, V-TYPE, TOM		M	29.30	520
TAILS	25.50		25.50	40
MECHANICALLY SEPARATED 2/	26.00		26.00	160
THIGH MEAT - FROZEN	84.00-86.00		85.33	240

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
TUESDAY, JULY 19, 2005	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS		F	49.46	224
WINGS FULL-CUT - TOMS		M	31.12	185
WINGS, V-TYPE, TOM		M	29.30	520
TAILS				
MECHANICALLY SEPARATED 2/		W	30.00	208
THIGH MEAT - FROZEN		M	85.28	184

EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME
MONDAY, JULY 18, 2005	RANGE	CODE 1/	PRICE	(000)
DRUMSTICKS, TOMS		F	49.46	224
WINGS FULL-CUT - TOMS	30.00-32.00		31.12	185
WINGS, V-TYPE, TOM	28.50-31.00		29.30	520
TAILS				
MECHANICALLY SEPARATED 2/		W	30.00	208
THIGH MEAT - FROZEN	85.00-85.50		85.28	184

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.